

Site Visit – What to Expect and How to Prepare

What: Site visits are our preferred way to learn about a nonprofit or charitable project working in Napa Valley. It allows us to get a feel for the group, how it's run, and see its work in action whenever possible.

When: We like to meet with a Napa County nonprofit/project at least once before we recommend a grant or include them in our newsletter. Our site visits typically last between 60-90 minutes.

Who: We typically meet with the Executive Director. If the group has a Development Director, they often join in. If it's an all-volunteer group, we meet with a few of the board members.

Where: If possible, we meet at the nonprofit's site, if they have one, so we can get an in-person feel for the group and their work. But a site visit can also happen at our offices or through a phone call or virtual meeting.

Why: We want to learn as much as possible in an interview format, see the nonprofit in action and begin to develop a relationship with staff. We also want to give the nonprofit a chance to learn about NVCF and our grantmaking. Transparency on both sides is our ultimate goal.

What to Expect

- We'll ask a lot of detailed questions. We do this so we can have a thorough feel for your project or organization.
- We'll ask questions about your operating budget, program budgets, sources of funding and grant applications pending.
- We may ask to take photographs to post on our website or publish in our newsletter. We only take photographs with your permission, and we ask any photographed individuals to sign a release form.
- We often do some research before a site visit. We review IRS Form 990s, annual reports or audited financials, as well as material on your website. We also look at NVCF's prior grantmaking and relationships to your organization.
- We usually invite a NVCF Board member to join staff for the site visit. We will confirm number of attendees with you prior to the site visit.
- We won't make any promises about funding.

Sample Questions

- What does your nonprofit do? (Programs, context in which the agency works, crossover with other nonprofits, and changes to service delivery in the short or long term.)
- What is the problem/need the agency is trying to address?
- Tell us about your Board – weaknesses, transitions, priorities.
- How is your group funded? What does the funding pie chart look like?
- What is the overall operating budget? What are the financial challenges?
- What are the operating or program challenges? What is the plan to address them?
- What are your top needs currently or in the next six months?